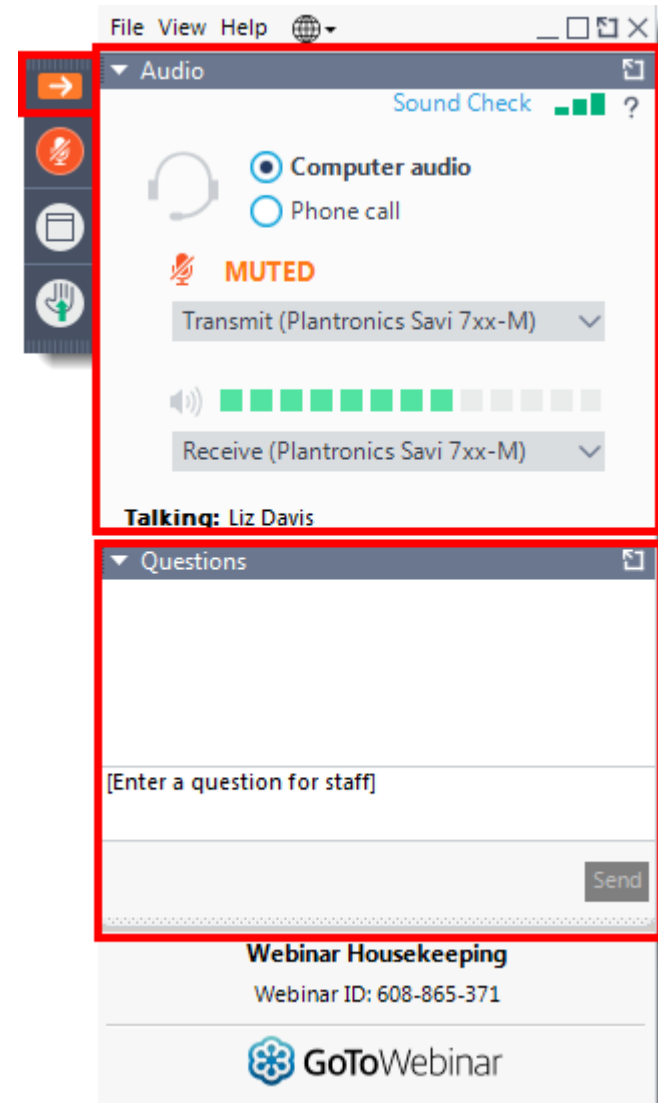


# While we wait – audio instructions

- Select the Audio section of the GoToWebinar control panel.
- Select Computer audio.
- To submit a question or comment, type it in the Questions panel.





Employer Training:  
Overview of Member Portal  
January 12, 2021





# Agenda

1. Registration process
2. Sign in process
3. Dashboard and navigation
4. Member communication
5. Questions

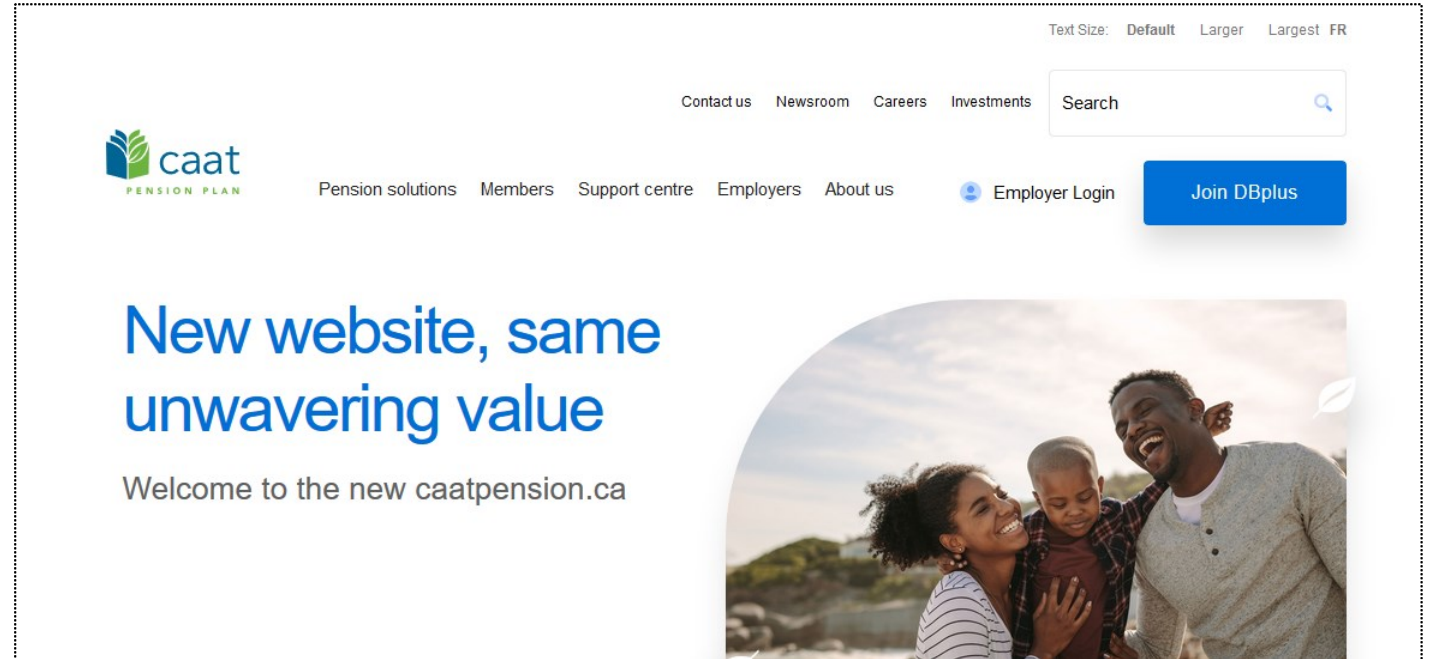


A photograph of a diverse group of people with their hands stacked in a circle, symbolizing teamwork and collaboration. The image is overlaid with a semi-transparent blue rectangle. A solid green diagonal line runs across the bottom right corner of the blue rectangle.

# Registration process

# Registration process

- Member will access the Portal through the CAAT website
- Member will then click on the “Sign In” link to register



# Registration process

- Once the member has clicked on the link, they will be directed to this page to sign in

The screenshot shows the CAAT Pension Plan website. At the top right, there is a text size selector with options: Default, Larger, Largest, and FR. Below this, there is a search bar with the word 'Search' and a magnifying glass icon. The CAAT logo is on the left, with the text 'caat PENSION PLAN' below it. To the right of the logo is a navigation menu with links: Pension solutions, Members, Support centre, Employers, About Us, and Sign In. The main heading is 'Sign in to My Pension'. Below this is a sub-heading: 'With My Pension, you have access to your personal pension information:'. There are four bullet points describing the benefits of My Pension. At the bottom, there is a blue button with the text 'Sign in to Pension Administration Link'.

Text Size: Default Larger Largest FR

Contact Us Newsroom Careers Investments Search

caat PENSION PLAN Pension solutions Members Support centre Employers About Us Sign In

## Sign in to My Pension

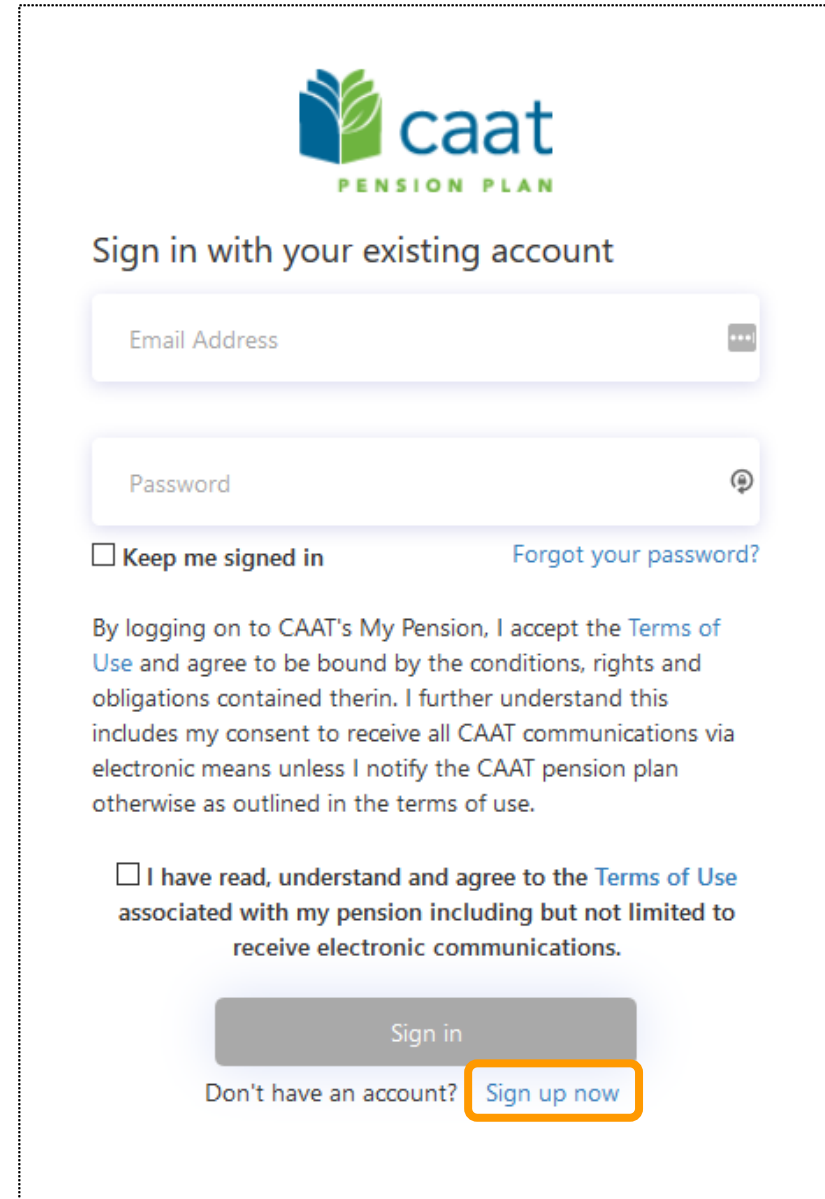
With My Pension, you have access to your personal pension information:


- Receive your Annual Statement online: Access your Statement any time you want, as soon as it's ready. Plus, all your future Statements will be accessible on My Pension, as they become available.
- Manage your contact information easily: It's up to you to keep your contact information current with the CAAT Plan. My Pension makes it easy. Change your address, phone, or email, or update your designated beneficiaries. There's no need to call the Plan or complete a form.
- Get an estimate with retirement planning tools: Get an estimate without entering any data - My Pension will automatically populate the fields for you. Plus, estimate different retirement scenarios, and see how a purchase can increase your retirement income.
- Secure messages with CAAT: Send and receive secure messages about your pension through the Message Centre.

Sign in to Pension Administration Link

# Registration process

- Member will click on the “Sign up now” link to register





Sign in with your existing account

Email Address

Password

Keep me signed in [Forgot your password?](#)

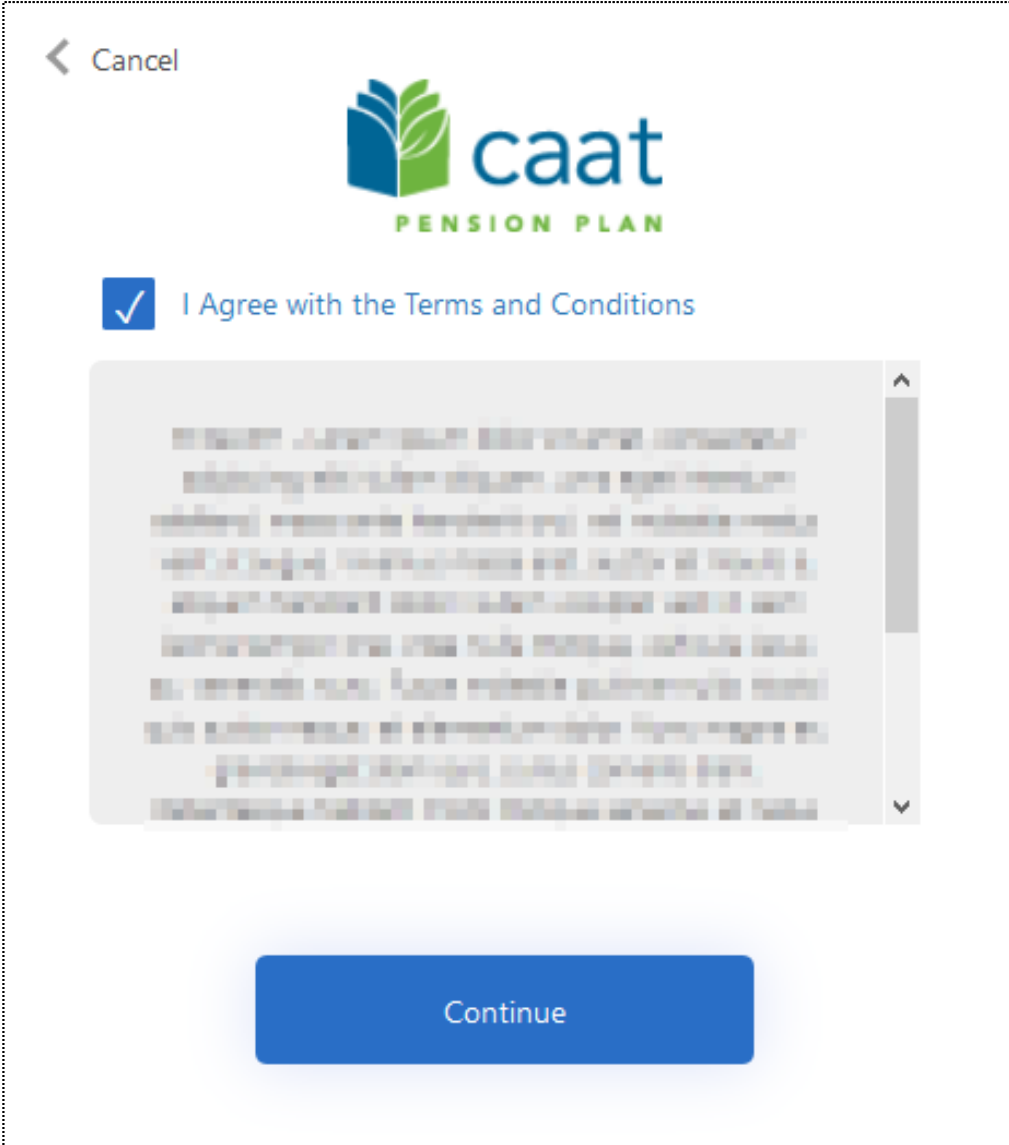
By logging on to CAAT's My Pension, I accept the [Terms of Use](#) and agree to be bound by the conditions, rights and obligations contained therein. I further understand this includes my consent to receive all CAAT communications via electronic means unless I notify the CAAT pension plan otherwise as outlined in the terms of use.

I have read, understand and agree to the [Terms of Use](#) associated with my pension including but not limited to receive electronic communications.

Don't have an account? [Sign up now](#)

# Registration Process

- Member will view and confirm their agreement with the “Terms and Conditions”

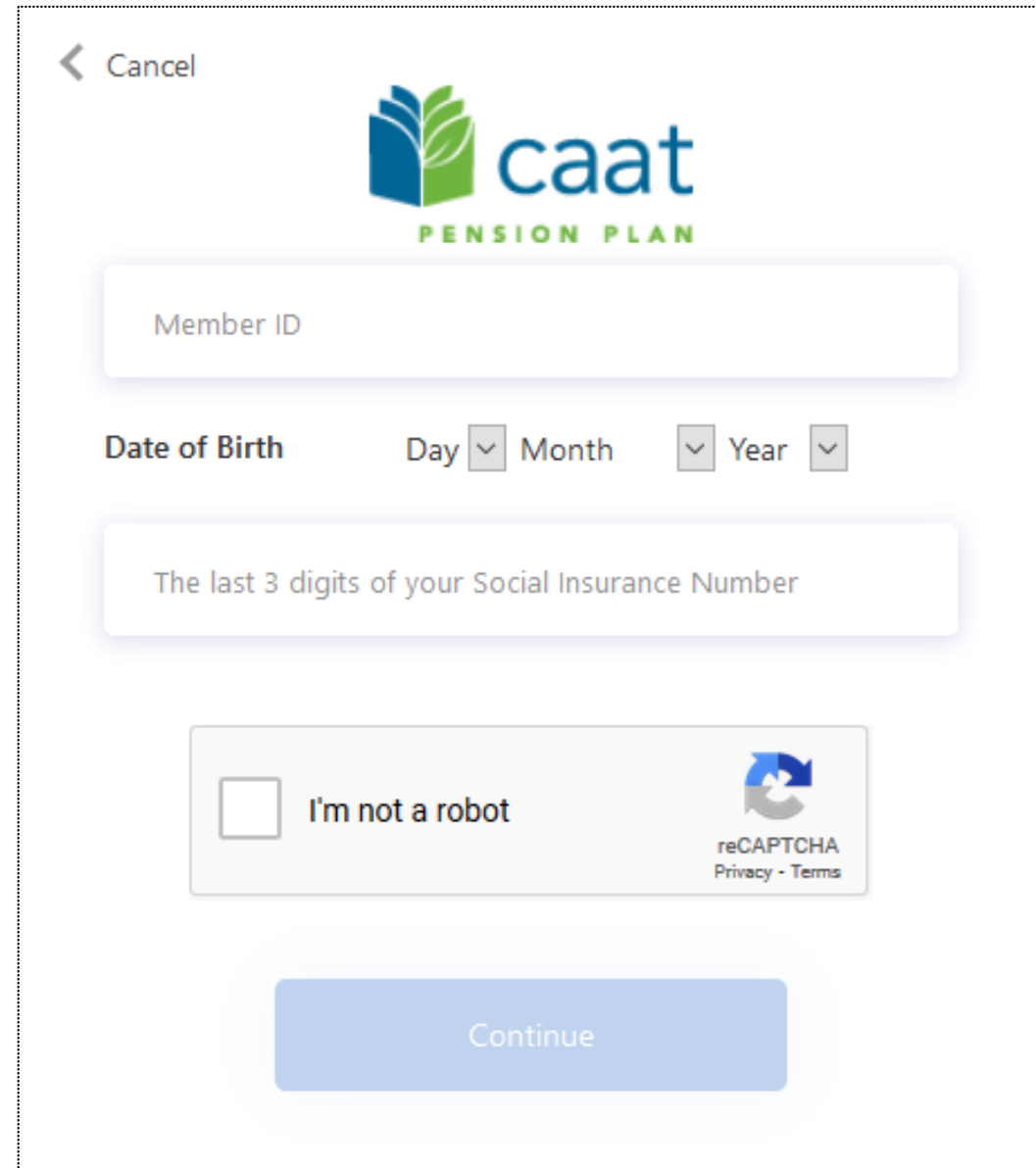


The screenshot displays a mobile application interface for the CAAT Pension Plan. At the top left, there is a back arrow and the text "Cancel". The CAAT Pension Plan logo is centered at the top, featuring a stylized leaf icon and the text "caat PENSION PLAN". Below the logo, there is a checked checkbox followed by the text "I Agree with the Terms and Conditions". A scrollable text box contains the terms and conditions, which are currently blurred. At the bottom of the screen, there is a prominent blue button labeled "Continue".



# Registration process

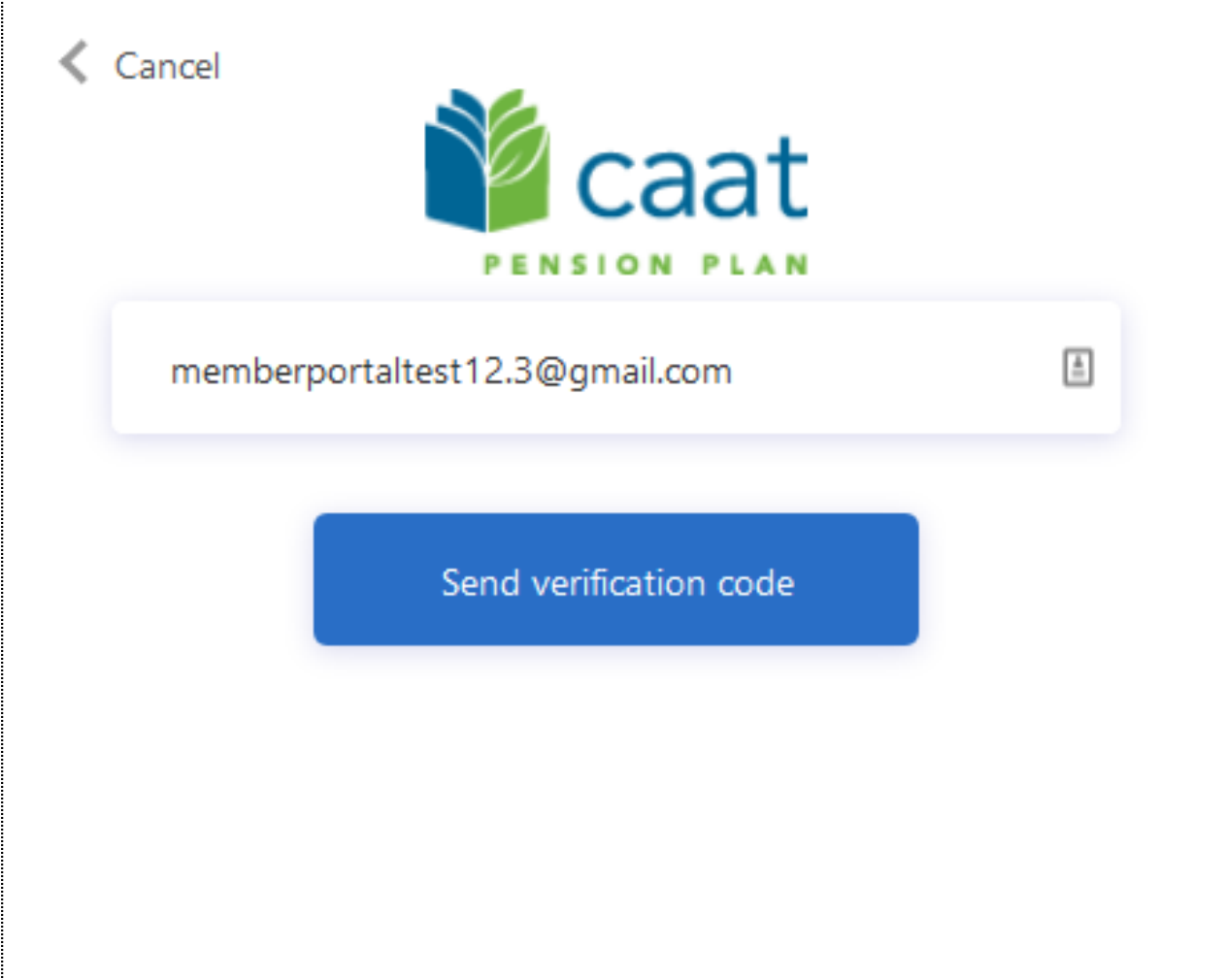
- Member will enter their:
  - Member ID
  - Date of Birth
  - Last 3 digits of their Social Insurance Number
- The Member ID will be included in the member's portal registration package which will be mailed out.



The screenshot shows a mobile registration form for the CAAT Pension Plan. At the top left is a back arrow and the text "Cancel". The CAAT Pension Plan logo is centered at the top. Below the logo is a text input field labeled "Member ID". Underneath is the "Date of Birth" section, consisting of a label "Date of Birth" followed by three dropdown menus for "Day", "Month", and "Year". Below that is another text input field labeled "The last 3 digits of your Social Insurance Number". At the bottom of the form is a reCAPTCHA widget with a checkbox labeled "I'm not a robot" and the reCAPTCHA logo and text "reCAPTCHA Privacy - Terms". A large blue "Continue" button is positioned at the very bottom of the form.

# Registration process

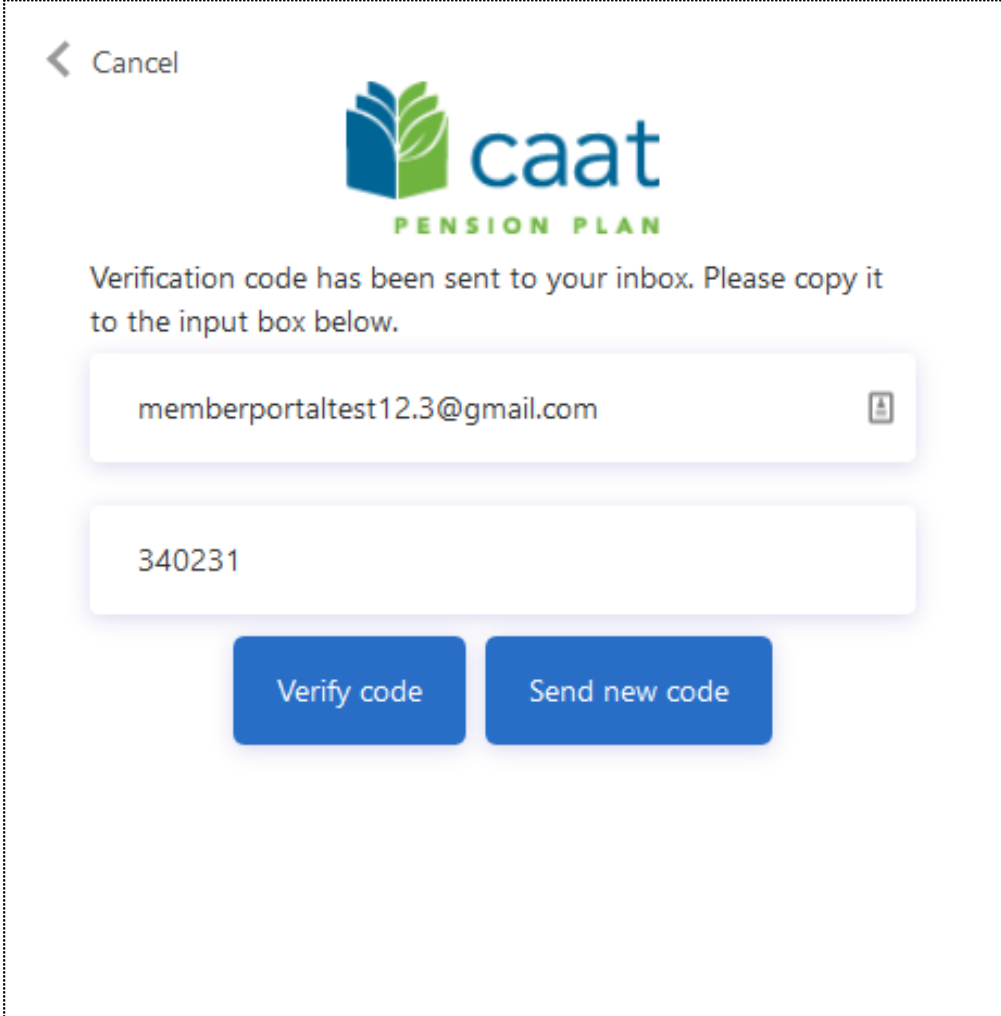
- Once the member's information has been validated, an email address is required
- A verification code will be sent to confirm the email address



The screenshot shows a mobile application interface for the CAAT Pension Plan. At the top left, there is a back arrow and the text "Cancel". In the center, the CAAT Pension Plan logo is displayed, featuring a stylized green and blue leaf icon to the left of the text "caat" in blue and "PENSION PLAN" in green below it. Below the logo is a white input field with rounded corners containing the email address "memberportaltest12.3@gmail.com" and a small icon of a document with a checkmark on the right side. Below the input field is a prominent blue button with rounded corners and the text "Send verification code" in white.

# Registration process

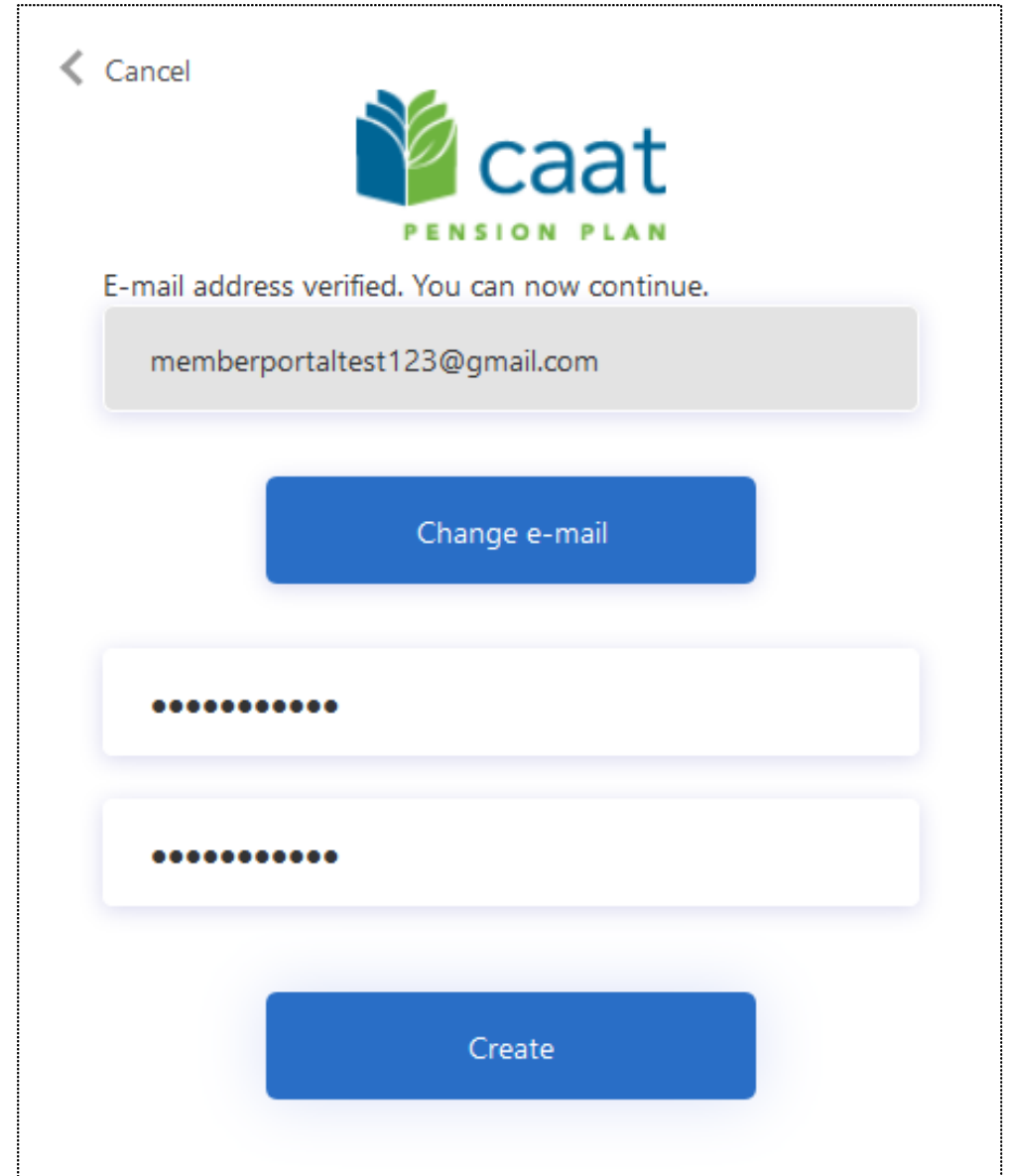
- Member will receive the code to their inbox, then enter and verify the code on this screen



The screenshot shows a mobile application interface for the CAAT Pension Plan. At the top left, there is a back arrow and the text "Cancel". The CAAT Pension Plan logo is centered at the top, featuring a stylized green leaf icon to the left of the text "caat" in blue, with "PENSION PLAN" in green below it. Below the logo, a message states: "Verification code has been sent to your inbox. Please copy it to the input box below." There are two input fields: the first contains the email address "memberportaltest12.3@gmail.com" and has a copy icon on the right; the second contains the verification code "340231". At the bottom, there are two blue buttons: "Verify code" on the left and "Send new code" on the right.

# Registration process

- Member will have the option to change their email address. If they chose not to, they will enter their password
- Once completed, they can click “Create”



The screenshot displays a mobile application interface for the CAAT Pension Plan. At the top left, there is a back arrow and the text "Cancel". The CAAT Pension Plan logo is centered at the top, featuring a stylized green and blue leaf icon to the left of the text "caat" in blue and "PENSION PLAN" in green below it. Below the logo, a message reads "E-mail address verified. You can now continue." A grey input field contains the email address "memberportaltest123@gmail.com". Below this field is a blue button labeled "Change e-mail". Underneath are two white input fields for password creation, each filled with ten black dots. At the bottom is a blue button labeled "Create".



# Registration process

- Member will be directed to choose their security questions from each of the drop-down lists

## Choose Your Security Questions

Please select three security question from the options in the dropdown list and answer each question.

Security Question 1:	What were the last four digits of your childhood telephone number?
Answer:	0000
Security Question 2:	What are the last five digits of your driver's license number?
Answer:	00000
Security Question 3:	What is your grandmother's (on your mother's side) maiden name?
Answer:	Brown

# Registration process - Demographic information

- Member will be asked to verify their demographic information

## Demographic Information

First Name :	FNAME
Middle Name :	
Last Name :	LNAME
Date of birth :	26-Sep-1984
Gender :	Female

[Edit](#) [Next](#)

# Registration process - Member contact details

- Member will be asked to verify their contact details

## Member Contact Details

Country :	Canada
Street :	0000 AAAAAAA AAAA
Street Line 2 :	
City :	AAAAAAA
Province :	Ontario
Postal Code :	A0A0A0
Home Phone :	
Extension :	

[Edit](#) [Next](#)

# Registration process - Spouse details

- Member will be asked to verify their spouse details

## Spouse Details

Marital Status:	Common Law
First Name:	fPWpYITHA
Middle Name:	
Last Name:	AZ
Date of birth:	1982-06-30
Gender:	Male
Marriage Date:	2014-07-22

[Edit](#) [Next](#)



# Registration process - Member beneficiary details

- Member will be asked to verify their beneficiary details
- If a change is required, the member would click “Edit”

Member Beneficiary Details							
First Name	Middle Name	Last Name	Date of birth	Relationship	Share Percent	BLevel	Added Date
OVyuOWs		Cloh	01-Nov-1960	Parent	50%	2	20-Jun-2018
sMLtyR		WkEr	25-Feb-1958	Parent	50%	2	20-Jun-2018

[Edit](#) [Next](#)

# Registration process - Member beneficiary details

- Member may delete or change the percentage to any existing beneficiary
- They may also “Add” a new beneficiary

### Member Beneficiary Details

Your spouse is your primary beneficiary. In addition, the following have been named as designated beneficiaries, in case your spouse pre-deceases you.

First Name	Middle Name	Last Name	Relationship	Date of birth	Share Percent	
OVyuOWs		Cloh	Parent	1960-11-01	.33	X
sMLtyR		WkEr	Parent	1958-02-25	.33	X
<input type="text" value="BFNAME"/>	<input type="text"/>	<input type="text" value="BLNAME"/>	<input type="text" value="Sibli"/>	<input type="text" value="06/06/1988"/>	33.34	X

# Registration process - Member beneficiary details

- Confirm update and “Save”

## Confirm Update

Below is the summary of changes you are about to submit to CAAT. Please check the information carefully before submission.

First Name	Middle Name	Last Name	Relationship	Date of birth
OVyuOWs		Cloh	Parent	01-Nov-1960
sMLtyR		WkEr	Parent	25-Feb-1958
BFNAME		BLNAME	Sibling	06-Jun-1988

< >

**Disclosure**  
I agree with the terms and conditions and acknowledge the information is accurate and true.

# Registration process - Member beneficiary details

- If the member would like a copy of the beneficiary changes, they can “Save for my records” and print a copy
- Member will click “Back to home” to continue the process.

## Update Summary

The following information has been submitted to CAAT successfully.

First Name	Middle Name	Last Name	Relationship	Date of birth
OVyuOWs		Cloh	Parent	01-Nov-1960
sMLtyR		WkEr	Parent	25-Feb-1958
BFNAME		BLNAME	Sibling	06-Jun-1988

< >

[Back to home](#) [Save for my records](#)



# Registration process – Member beneficiary details

- A *Beneficiary Designation* Form will be created
- It can be downloaded and saved

#R2786#T#----#P#-----  
Submitted on 2021-01-11 via Member Portal

**Beneficiary Designation Form**

Members: This form applies only to your spousal information and beneficiary designation for your CAAT Pension Plan pre-retirement death benefits. Keep a copy of this form for your records and send the completed original to the CAAT Pension Plan at the address below.  
 Note: Date format is dd-mm-yyyy for all date fields.  
 Contact your employer if you need to update your spouse or beneficiary information for any other workplace benefits to which you may be entitled.

Employer Name: \_\_\_\_\_

**A. Member identification – information currently on file at the CAAT Pension Plan**

Last name LNAME	First name FNAME	Initial	Social Insurance Number 001203207	Date of birth
--------------------	---------------------	---------	--------------------------------------	---------------

**B. Marital status – use this section to provide information about your spouse if applicable**

Your spouse is the person to whom you are legally married or in a common-law relationship. See reverse for definition of spouse in your jurisdiction.

Married  Common-Law      Complete this information about your eligible spouse

Spouse last name	Spouse first name	Sex (M/F)	Spouse date of birth	Date of marriage / Start of common law
_____	_____	_____	_____	_____

**C. Designated beneficiary – use this section to name the designated beneficiaries of your CAAT Pension Plan pre-retirement death benefit**

The CAAT Pension Plan pays a pre-retirement death benefit if you die before you retire. If you have an eligible spouse on the date of your death, they are sole recipient of the pre-retirement death benefit. Your designated beneficiaries can only receive the pre-retirement death benefit if you do not have an eligible spouse on the date of your death. You should name as your designated beneficiaries the person or persons who you would like to receive the pre-retirement death benefit in the event that you do not have an eligible spouse on the date of your death.

Note: if your jurisdiction of employment is Ontario or Nova Scotia and you do not have an eligible spouse, but have eligible children on the date of your death (dependent under age 18), they will receive a children's pension and the pre-retirement death benefit paid to your designated beneficiaries or estate will be correspondingly reduced.

At the time of your death, the CAAT Pension Plan will determine whether your spouse qualifies as the eligible spouse for the pre-retirement death benefit based on applicable pension legislation in your jurisdiction of employment. Refer to the CAAT Plan's website for more details on the pre-retirement death benefit, eligible spouse.

Remember: the total % Share must add up to exactly

Full name	Relationship	Date of birth	% Share
OVyuOWs Cloh	BP	01-Nov-1960	33.33
sMLtyR WkEr	BP	25-Feb-1958	33.33
BFNAME BLNAME	BS	06-Jun-1988	33.34
_____	_____	_____	_____
_____	_____	_____	_____

**D. Member authorization**

I certify that the information provided on this form is true and correct. I authorize the Plan and its agents to collect, share and use my personal information as may be needed for the purposes of calculating and paying pension benefits and activities related to the administration of the Plan. Personal information is collected, used and maintained by the Plan in accordance with its privacy policy available at [www.caatpension.ca](http://www.caatpension.ca).

\_\_\_\_\_      \_\_\_\_\_  
 Member Signature      Date

CAAT Pension Plan 250 Yonge Street, Suite 2000, Toronto ON M5B 2L7 Tel: 416.673.9000 Toll Free: 1.866.350.2225 Fax: 416.673.9025 [www.caatpension.ca](http://www.caatpension.ca)  
 CHG-103-01-2021-G

# Registration process - Member beneficiary details

- The beneficiary information has been updated and the member can continue the process

Member Beneficiary Details							
First Name	Middle Name	Last Name	Date of birth	Relationship	Share Percent	BLevel	Added Date
OVyuOWs		Cloh	01-Nov-1960	Parent	33.33%	2	11-Jan-2021
sMLtyR		WkEr	25-Feb-1958	Parent	33.33%	2	11-Jan-2021
BFNAME		BLNAME	06-Jun-1988	Sibling	33.34%	2	11-Jan-2021

[Edit](#) [Next](#)

# Registration process – Member employment details

- Member can view their employment details

## Member Employment Details

Employer Name :	Sheridan Institute of Technology and Advanced Learning
Current Plan Design :	DBprime
Enrolment Date :	11-Feb-2013
Hire Date :	11-Feb-2013

Next

# Registration process - User preference details

- Member will be able to edit and confirm their user preferences

## User Preference Details

Primary Email:

Secondary Email:

Pref. Method of Communication:

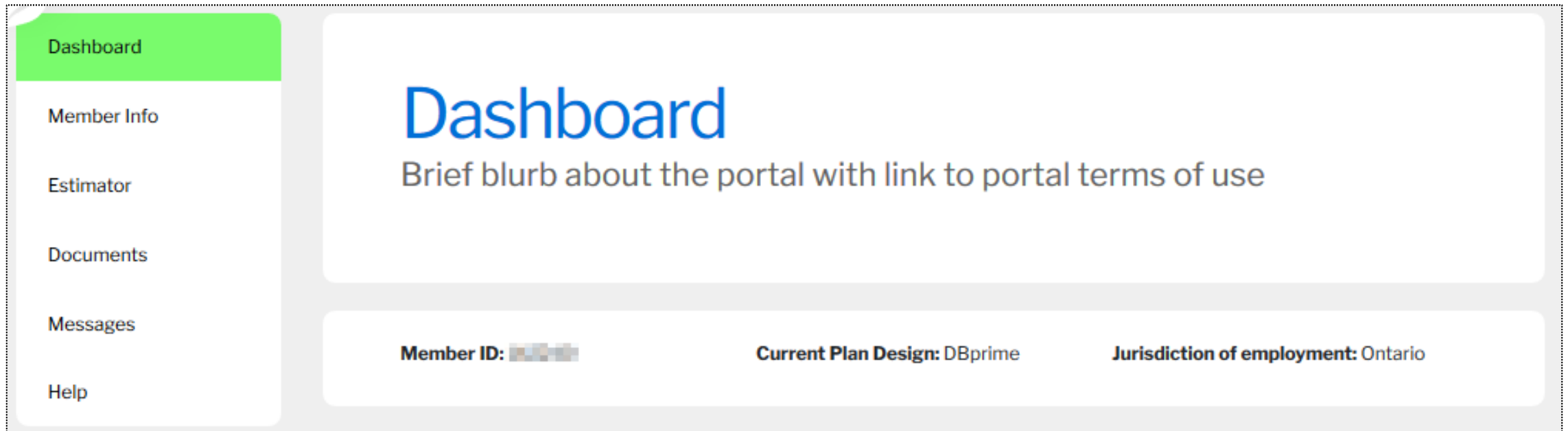
User Language:

Subscribe to Newsletters:

Subscribe to Announcements:

# Registration process - User preference details

- The member is directed to the Dashboard



The screenshot displays a user dashboard with a left-hand navigation menu and a main content area. The navigation menu includes links for Dashboard, Member Info, Estimator, Documents, Messages, and Help. The main content area features a large 'Dashboard' heading, a brief blurb about the portal with a link to portal terms of use, and a summary of user information: Member ID (blurred), Current Plan Design: DBprime, and Jurisdiction of employment: Ontario.

**Dashboard**

Member Info

Estimator

Documents

Messages

Help

## Dashboard

Brief blurb about the portal with link to portal terms of use

**Member ID:** [blurred]

**Current Plan Design:** DBprime

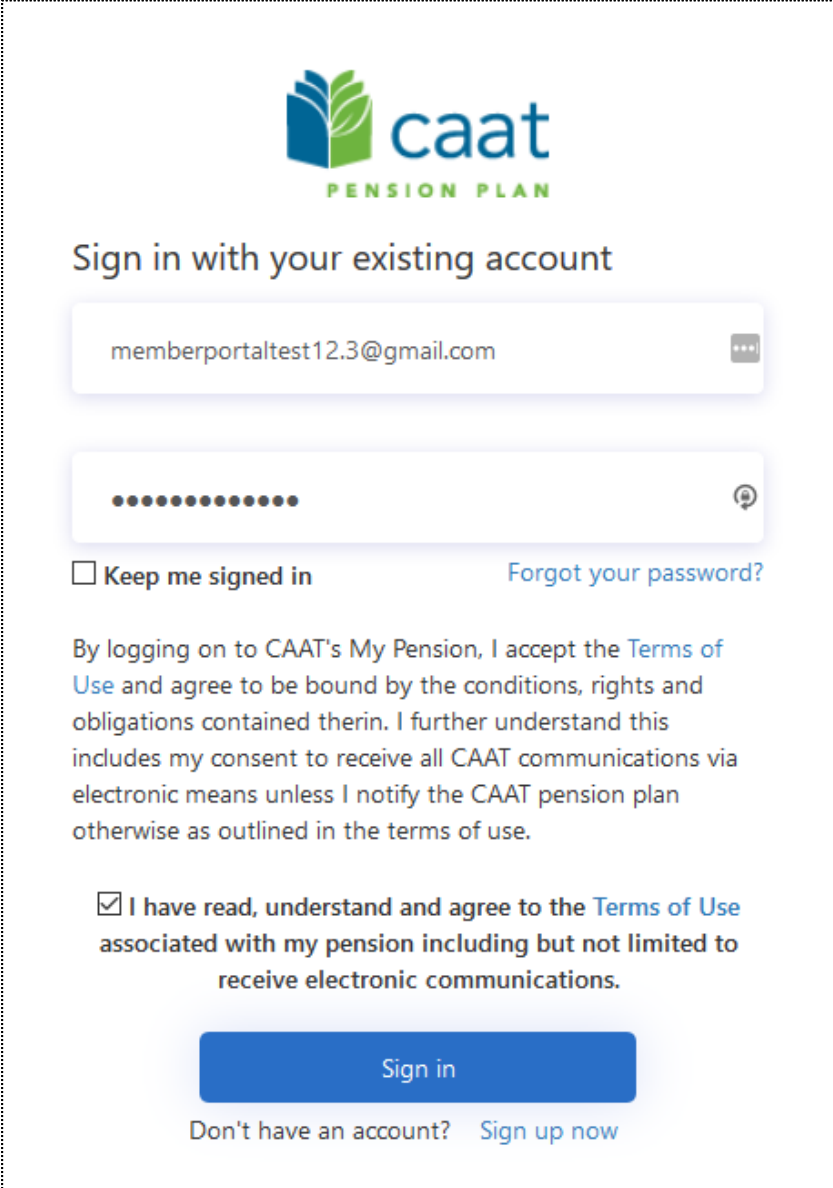
**Jurisdiction of employment:** Ontario




**Sign in process**

# Sign in and navigation

- Go to [www.caatpension.ca](http://www.caatpension.ca) to sign into the member portal



The screenshot shows the CAAT Pension Plan sign-in interface. At the top is the CAAT Pension Plan logo, which consists of a stylized green and blue leaf icon followed by the text 'caat' in blue and 'PENSION PLAN' in green below it. Below the logo is the heading 'Sign in with your existing account'. There are two input fields: the first contains the email address 'memberportaltest12.3@gmail.com' and has a clear button (three dots in a square) on the right; the second is a password field with ten black dots and a show/hide button (an eye icon in a square) on the right. Below the password field is a checkbox labeled 'Keep me signed in' and a link 'Forgot your password?'. A paragraph of text follows, stating: 'By logging on to CAAT's My Pension, I accept the Terms of Use and agree to be bound by the conditions, rights and obligations contained therein. I further understand this includes my consent to receive all CAAT communications via electronic means unless I notify the CAAT pension plan otherwise as outlined in the terms of use.' Below this is a checked checkbox with the text: 'I have read, understand and agree to the Terms of Use associated with my pension including but not limited to receive electronic communications.' At the bottom is a blue 'Sign in' button, and below that is the text 'Don't have an account?' followed by a 'Sign up now' link.



Sign in with your existing account

memberportaltest12.3@gmail.com

.....

Keep me signed in [Forgot your password?](#)

By logging on to CAAT's My Pension, I accept the [Terms of Use](#) and agree to be bound by the conditions, rights and obligations contained therein. I further understand this includes my consent to receive all CAAT communications via electronic means unless I notify the CAAT pension plan otherwise as outlined in the terms of use.

I have read, understand and agree to the [Terms of Use](#) associated with my pension including but not limited to receive electronic communications.


[Sign in](#)

Don't have an account? [Sign up now](#)



# Password Change

- To change password, click on “Forgot your password?”



Sign in with your existing account

memberportaltest12.3@gmail.com

.....

Keep me signed in [Forgot your password?](#)

By logging on to CAAT's My Pension, I accept the [Terms of Use](#) and agree to be bound by the conditions, rights and obligations contained therein. I further understand this includes my consent to receive all CAAT communications via electronic means unless I notify the CAAT pension plan otherwise as outlined in the terms of use.

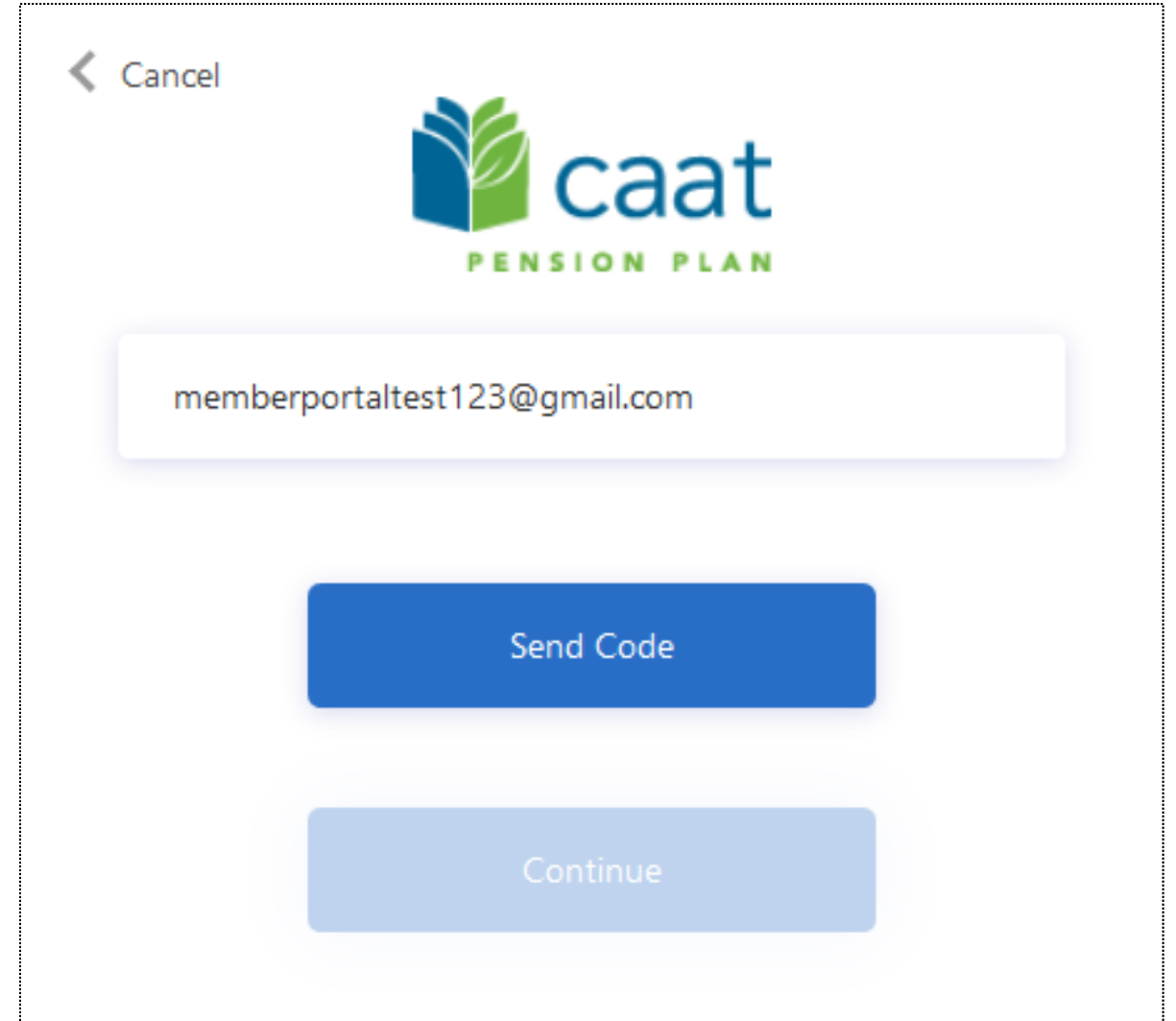
I have read, understand and agree to the [Terms of Use](#) associated with my pension including but not limited to receive electronic communications.

[Sign in](#)


Don't have an account? [Sign up now](#)

# Password Change

- Enter email address and “Send Code” for authentication



← Cancel



memberportaltest123@gmail.com


Send Code

Continue

# Password Change

- Enter the verification code and verify

[← Cancel](#)



Verification code has been sent. Please copy it to the input box below.

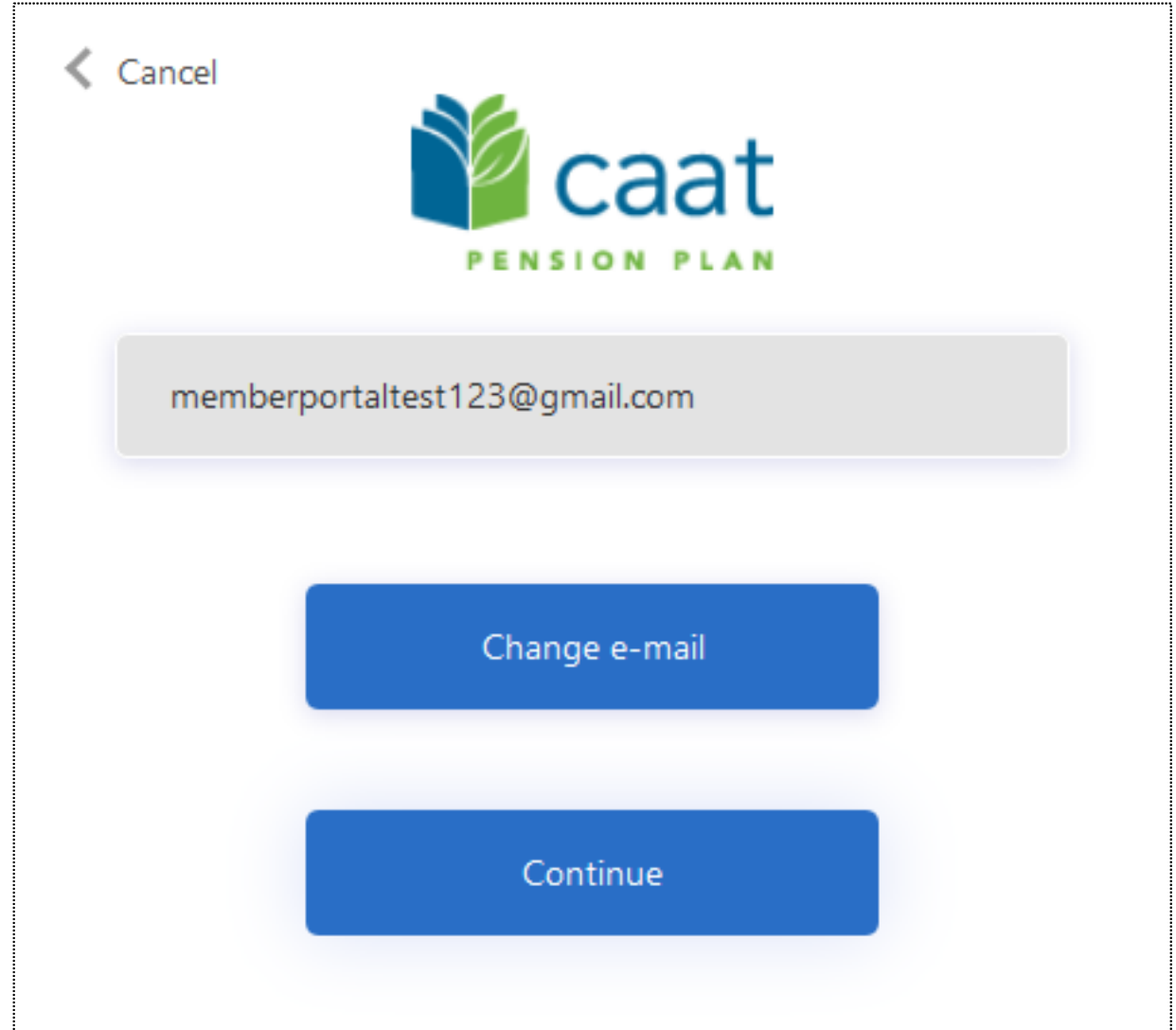
  
  

[Verify Code](#) [Send New Code](#)

[Continue](#)

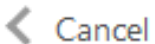
# Password Change


- Continue to change password



# Password Change

- Continue to change password
- Once password is changed, you will be directed to sign in again with the new password

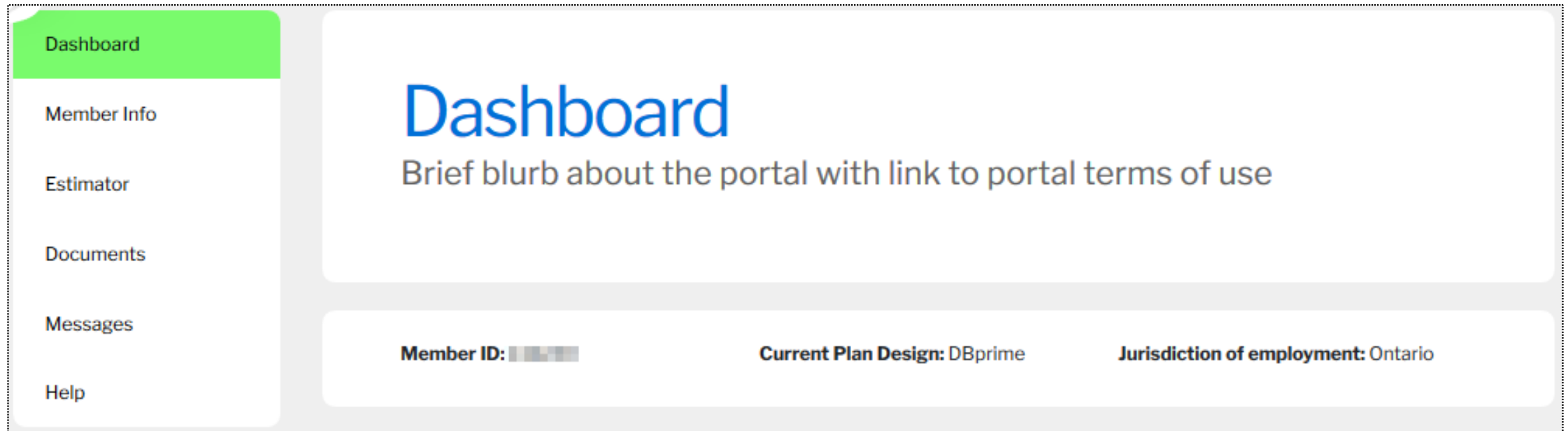
 Cancel



8-15 characters, containing 3 out of 4 of the following:  
Lowercase characters, uppercase characters, digits (0-9), and  
one or more of the following symbols: @ # \$ % ^ & \* - \_ + =  
[]{}|\: ', ? / ^ ~ " ( ) ; . OR 16+ characters

# Sign in and navigation

- You have successfully signed into the member portal!



The screenshot shows a web interface for a member portal. On the left is a vertical navigation menu with a green highlight on the 'Dashboard' item. The main content area features a large blue 'Dashboard' heading, a sub-heading 'Brief blurb about the portal with link to portal terms of use', and a summary bar at the bottom with three data points: Member ID, Current Plan Design, and Jurisdiction of employment.

Member ID:	Current Plan Design:	Jurisdiction of employment:
██████	DBprime	Ontario



# Dashboard and navigation



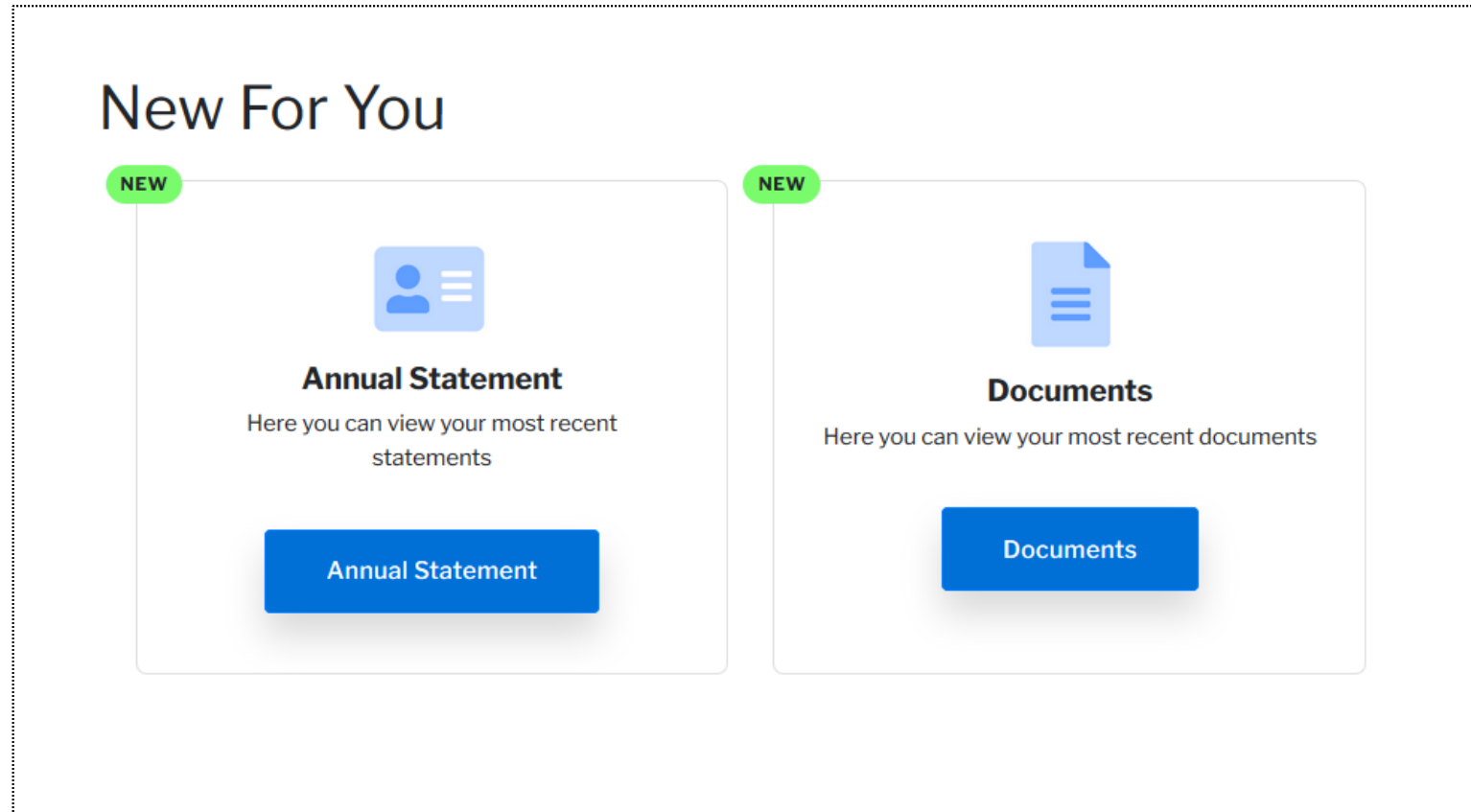
# Dashboard and navigation

- On the Dashboard screen, the member's current pension benefit information which includes retirement dates
- Member will be able to access the Pension Estimator

The screenshot shows a web dashboard for a pension member. On the left is a vertical navigation menu with the following items: Dashboard (highlighted in green), Member Info, Estimator, Documents, Messages, and Help. The main content area is divided into several sections. At the top, there is a header section with the title 'Dashboard' and a sub-header 'Brief blurb about the portal with link to portal terms of use'. Below this is a row of three status indicators: 'Member ID: [redacted]', 'Current Plan Design: DBprime', and 'Jurisdiction of employment: Ontario'. The main content is split into two columns. The left column is titled 'Your Pension' and lists four key metrics: 'Annual Accrued Pension to Date: \$6,273.48', 'Normal Retirement Date: 30-Sep-2049', 'Early Unreduced Retirement Date: 30-Jun-2041', and 'Early Retirement Date: 30-Sep-2034'. The right column features a bar chart icon, the title 'Pension Estimator', the text 'Estimate your pension at a different date or age', and a prominent blue button labeled 'Pension estimator'.

# Dashboard and navigation

- Member will also be able to access their Annual Statement and any recently submitted documents



# Dashboard and navigation

- The “Notifications” advises the member of any changes they have made to their file
- The “Process List” advises the member that any changes made have been completed

## Notifications

Activity Time	Activity
08-Jan-2021 08:48 AM	Beneficiary update email has been sent.
08-Jan-2021 08:48 AM	Change of Beneficiary information.

Navigation: 1 | 20 items per page | 1 - 2 of 2 items

## Process List

Process ID	Reference ID	Process Name	Process Status
2330		Change of Beneficiary information.	Complete

Navigation: 1 | 5 items per page | 1 - 1 of 1 items

# Dashboard and navigation – Member info

- Member info displays the member information that is currently on file with CAAT:
  - Demographic Information
  - Plan History
  - Member Employment Details
  - Member Contact Details
  - Spouse Details
  - Member Beneficiary Details

The screenshot shows a web application interface for 'Member info'. On the left is a vertical navigation menu with the following items: Dashboard, Member Info (highlighted in green), Estimator, Documents, Messages, and Help. The main content area has a header 'Member info' in blue. Below this is a section titled 'Demographic Information' with a blue header bar. The details are as follows:

<b>First Name:</b> FNAME	<b>Middle Name:</b>	<b>Last Name:</b> LNAME
<b>Gender:</b> Female	<b>Date of birth:</b> 26-Sep-1984	

An 'Edit' button is located to the right of the demographic information. Below this section are five expandable rows, each with a blue plus sign on the right:

- Plan History
- Member Employment Details
- Member Contact Details
- Spouse Details
- Member Beneficiary Details

# Dashboard and navigation – Estimator

- Member can calculate a retirement estimate
- To access the Estimator, member will agree with terms and conditions and click “Next”

The screenshot displays a web interface for a Pension Estimator. On the left is a vertical navigation menu with the following items: Dashboard, Member Info, Estimator (highlighted in green), Documents, Messages, and Help. The main content area has a blue header titled "Pension Estimator". Below the header is a block of blurred text representing terms and conditions. At the bottom of this text block is a checkbox followed by the text: "I agree with the terms and conditions and acknowledge the information is accurate and true." Below the checkbox is a blue button labeled "Next".

# Dashboard and navigation – Estimator

- Member can adjust certain assumptions in the calculator

## Estimator

View your popular options, or choose a custom retirement date below

---

### Quick pension estimate

Change your earnings used in your estimate

Your plan design:

Your earnings:

Earnings as of date:

You estimate your earnings will increase annually by?

[Update my estimated pension at key dates](#)

---

### Your estimated pension at key dates

These estimates are based on data in our pension system.

Age	Estimated Pension	Plan Type
Age 50	\$17,040	Lifetime pension
Age 56	\$28,020	Lifetime pension
Age 65	\$36,120	Lifetime pension

Additional values shown in the chart:

- Age 50: \$9,120 (DBprime bridge to 65\*)
- Age 56: \$15,060 (DBprime bridge to 65\*)

Labels below bars: Early reduced pension, Early pension, Normal retirement pension

# Dashboard and navigation – Documents

- Member can view documents that have been created.

Document List

Document List

Reference ID: Filter by Reference ID

Name: Filter by Name

Document Type: Select

Created By: Filter by created

Created Between: Filter by Date

And: Filter by Date

Reference ID	Name	Document Type	Created By	Created On
	BENEFICIARY_2021-01-11 2:19:01 PM_en-ca.pdf	Beneficiary	,	11-Jan-2021 2:19 PM

1 - 1 of 1 items



# Dashboard and navigation – Messages

- Messages to the member confirming the information submitted has been updated at CAAT
- To view the message, the member will click on the record they want to view

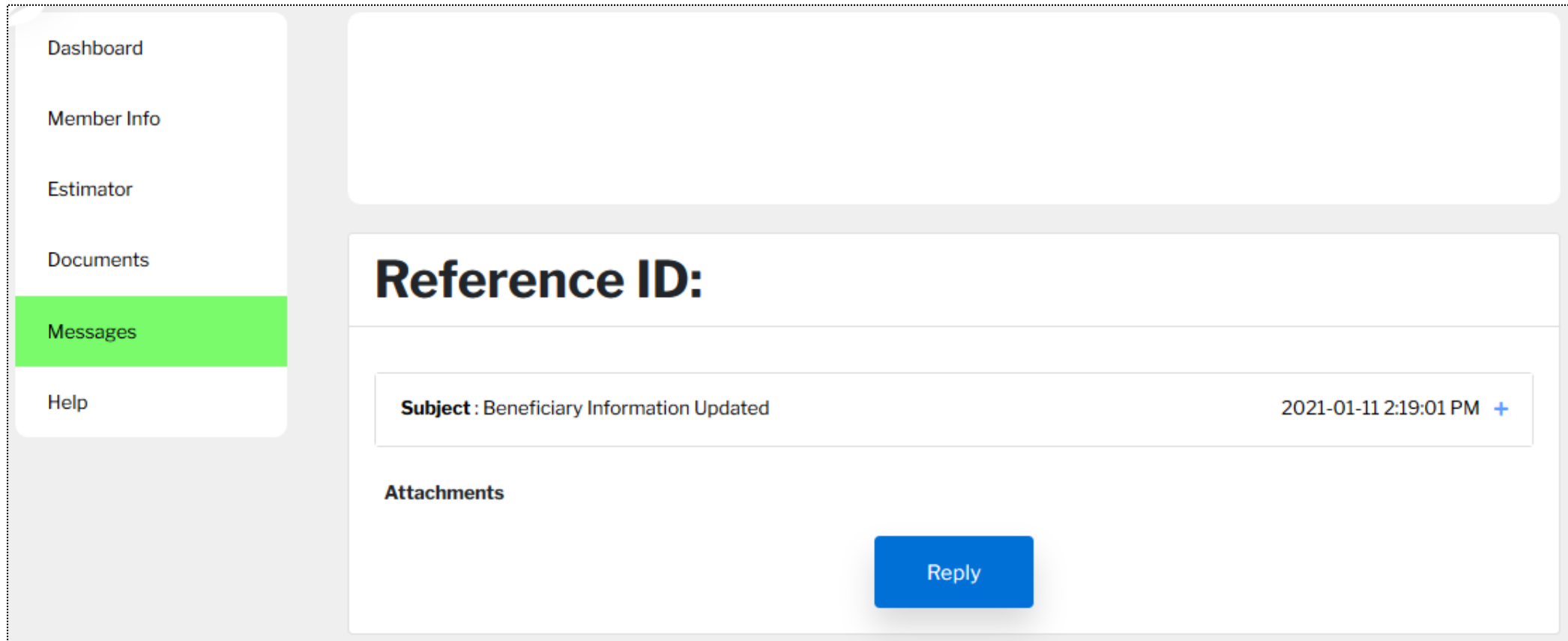
The screenshot displays the CAAT Message List interface. On the left is a sidebar with navigation links: Dashboard, Member Info, Estimator, Documents, Messages (highlighted in green), and Help. The main content area features a header with the title 'Message List' and the subtitle 'Securely communicate with CAAT'. Below the header is a 'Compose New' button. A search bar is present, followed by filter options for Process Id, Reference ID, Subject, and Date. A table displays one message record with the following details:

Process Id	Reference ID	Subject	Date
		Beneficiary Information Updated	11-Jan-2021 2:19 PM

At the bottom, there is a pagination control showing '1' of 1 items, a dropdown for '5 items per page', and a refresh icon.

# Dashboard and navigation – Messages

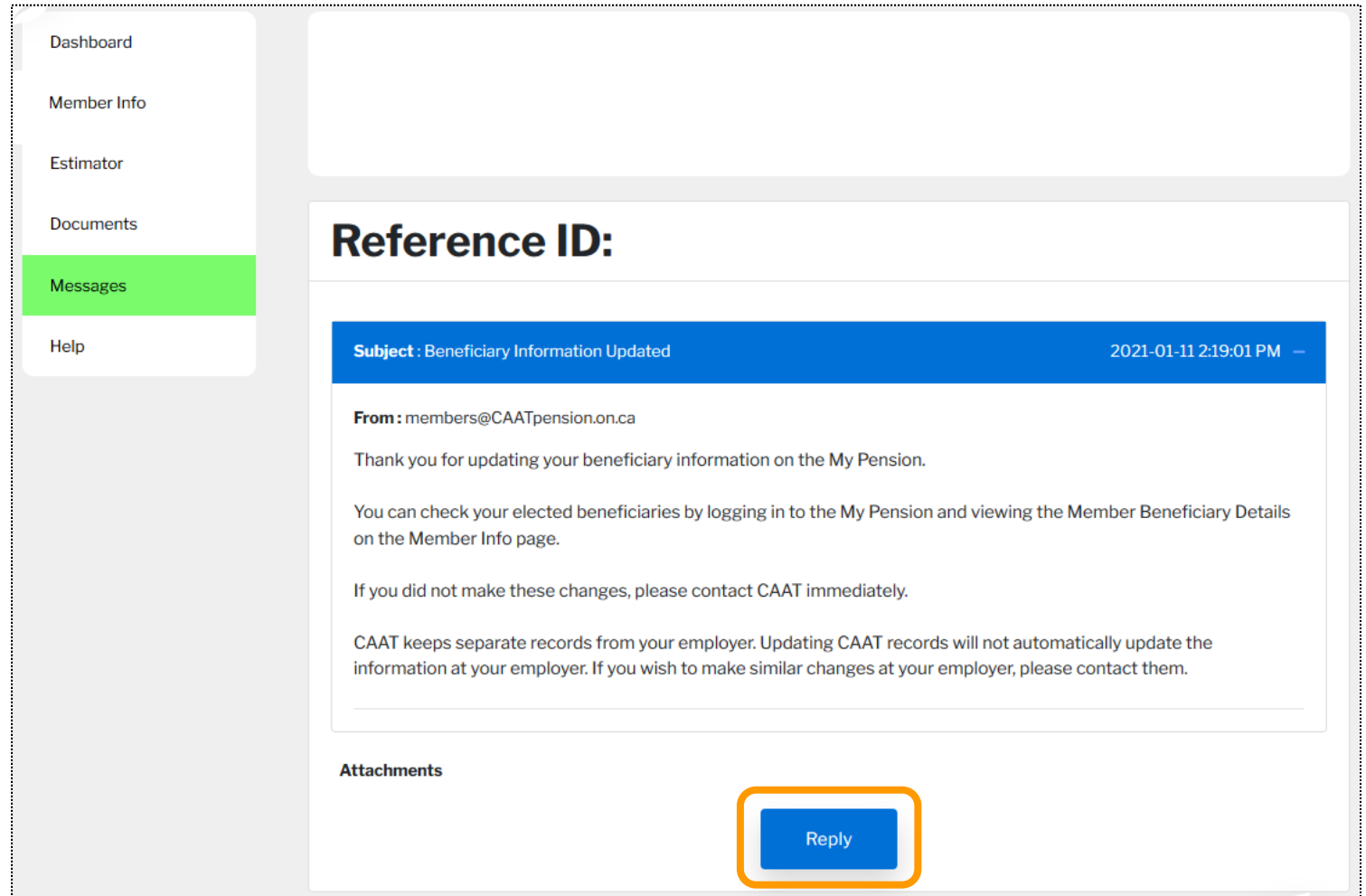
- Member will click on the subject to open the message



The screenshot displays a web dashboard with a left-hand navigation menu and a main content area. The navigation menu includes links for Dashboard, Member Info, Estimator, Documents, Messages (highlighted in green), and Help. The main content area features a large white box at the top, followed by a section titled "Reference ID:". Below this, a message card is shown with the subject "Beneficiary Information Updated" and a timestamp of "2021-01-11 2:19:01 PM" with a plus icon. Underneath the message card, there is an "Attachments" section and a blue "Reply" button.

# Dashboard and navigation – Messages

- If there are any attachments, they can click on *Attachments* to view.
- Member can also communicate with CAAT by replying to the message



The screenshot displays the CAAT Messages dashboard. On the left is a vertical navigation menu with the following items: Dashboard, Member Info, Estimator, Documents, Messages (highlighted in green), and Help. The main content area is titled "Reference ID:" and contains an email message. The message header is blue and includes "Subject: Beneficiary Information Updated" and the timestamp "2021-01-11 2:19:01 PM". The sender is "members@CAATpension.on.ca". The message body contains the following text: "Thank you for updating your beneficiary information on the My Pension. You can check your elected beneficiaries by logging in to the My Pension and viewing the Member Beneficiary Details on the Member Info page. If you did not make these changes, please contact CAAT immediately. CAAT keeps separate records from your employer. Updating CAAT records will not automatically update the information at your employer. If you wish to make similar changes at your employer, please contact them." Below the message is an "Attachments" section with a blue "Reply" button highlighted by an orange border.

# Dashboard and navigation – Messages

- Member can attach documents to the message

Dashboard

Member Info

Estimator

Documents

**Messages**

Help

## New Message

**To:** CAAT Member Portal

**Subject:** RE: Beneficiary Information Updated

**Message:**

**B I U** [List Icons] [Link Icon] [Table Icon] Paragr... ▾

I am sending a test message.

Thank you  
Test

**Attachments**

**Document Type**

Other ▾

Browse... This is a test document.docx

Cancel Send

Upload

# Dashboard and Navigation – Messages

- Once message is sent, a record is created and added to the member's message list with a reference ID.

Dashboard

Member Info

Estimator

Documents

**Messages**

Help

## Message List

Securely communicate with CAAT

[Compose New](#)

### Search

Process Id:  Filter by Process Id

Reference ID:  Filter by Reference ID

Subject:  Filter by subject

Date:  Filter by Date

Process Id	Reference ID	Subject	Date
	CA0012102	RE: Beneficiary Information Updated	11-Jan-2021 4:18 PM
		Beneficiary Information Updated	11-Jan-2021 2:19 PM

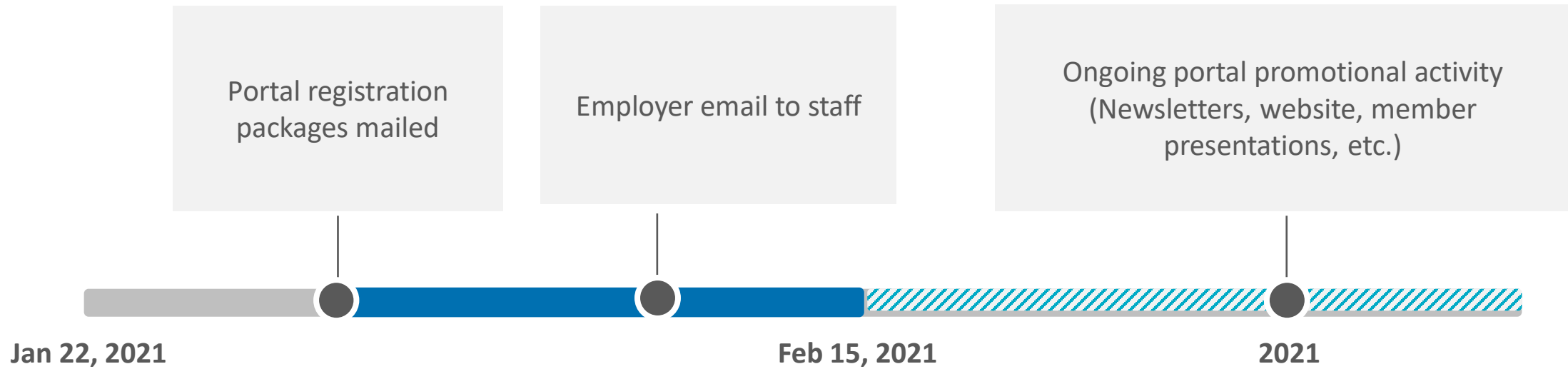
5 items per page 1 - 2 of 2 items

A photograph of a diverse group of people with their hands stacked in a circle, symbolizing teamwork and community. The image is overlaid with a semi-transparent blue rectangle. A green diagonal line runs across the bottom right corner of the blue rectangle.

# Member registration communications

# Member registration communications

## Timeline of communications





# Member registration communications

- Portal registration package
  - **Letter** introducing the portal with instructions on how to activate account
  - **Promotional insert** that explains the features of the portal
  - **Promotional envelope** that teases what's inside
- Sample email copy
  - Will be provided in both languages
  - Your employer PA will advise you of when the package will be going to your members, and you will be asked to send the email at the same time

Download samples on our website or in the Handout section of GoToWebinar

